Completing the EPER Function

EPER (PERSONNEL-MISCELLANEOUS)

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┌─────────────────────────────────────────────────────────┬───┬─┐
│          TN3270 - uccmvsb to host uccmvsb.ucop.edu       │ ▼ │▲│
├───────────────────────────────────────────────────────────┴───┴─┤
│ Session  Edit  Commands  Settings  Help                         │
│ PPEPER0 E0943          SCT EDB Entry/Update       AHIR 10/16/95 16:33:25 │
│                        Personnel-Miscellaneous     Userid:  SCPPSWCP │
│ ID: 650000007 Name: NEWHIRE, ACADEMIC DEMO    SSN: 650-00-0007 Pri Pay: │
│                                                                 │
│ Assigned BELI: 1 Derived BELI :  _        Effective Date: 070196 │
│ BELI Status Qualifiers: Primary: __ Date: ___  Secondary: __ Date: _____ │
│ Date of Hire              : 070196   Original Hire Date: ____    │
│ Employee Relations Code   : E        Employee Relations Unit: A7 │
│ Probationary Period End Date :                                  │
│ Next Salary Review Date   : ____     Next Salary Review Type: _ │
│ Merit Rate Increase Percent :                                   │
│ Home Department           : 000900 TRAINING ON-LINE UPDATE      │
│ Primary Title Code        : 1300   ASSISTANT PROFESSOR - 9-MONTHS │
│ Employee Unit Code        : __     Employee Representation Code  : _ │
│ Employee Special Handling Code: _  Employee Distribution Unit Code: _ │
│ Job Group ID              : _                                   │
│ Alternate Department Code : _____                               │
│ Academic Programmatic Unit Cd : _____                           │
│                                                                 │
│ Next Func: ____  ID: _____  Name: _____  SSN: _____ │
│ U0001  Input accepted                                           │
│ ===>                                                            │
│  F: 1-Help     2-Cancel              4-Print    5-Update        │
│  F:                       9-Jump    10-PrevFunc 11-NextFunc     │
├─────────────────────────────────────────────────────────────────┤
│                                            IBM-3278-2-E 16:37:17 │
└─────────────────────────────────────────────────────────────────┘
```

The EPER Procedure

1. Enter data in the following fields, as applicable:

Assigned BELI	Benefits Eligibility Level Indicator (BELI) code indicating the employee's eligibility for health benefits. Code from BELI form or press F1 Help to see valid codes.
Derived BELI	System-derived BELI code based on data entered previously. Normally the same as the assigned BELI code.
Effective Date	Date the employee becomes eligible for any health benefits indicated by the BELI code.

BELI Status Qualifiers	Primary: Code indicating the primary condition that qualifies the employee for health benefits when the assigned BELI and the derived BELI do not match. Press Fl Help to see valid codes.
	Date: Date on which the qualifying condition began, in the format: MMDDYY.
	Secondary: If applicable. Code indicating an additional condition that qualifies the employee for health benefits when the assigned BELI and the derived BELI do not match. Press Fl Help to see valid codes.
	Date: Date on which the additional qualifying condition began, in the format: MMDDYY.
Date of Hire	Date on which the *most recent* employment affiliation commenced.
Original Hire Date	Leave blank.
Employee Relations Code	Code indicating the employee designation/status for the purpose of collective bargaining. Press F1 Help to see valid codes, or refer to *Appendix E. Employee Relations Codes* for assistance in determining the appropriate code.
Employee Relations Unit	Code indicating collective bargaining unit of an individual. Press F1 Help to see valid codes or refer to *Appendix E.*
Next Salary Review Date	Currently not developed for academic reviews. Use is at discretion of academic division.

Next Salary Review Type	Currently not developed for academic reviews.
Merit Rate Increase Percent	For future use.
Home Dept	Six-digit service center home department code. Press F1 Help to see valid codes.
Primary Title Code	System derived for employees with multiple titles. Code indicating the primary title code that will be used for reporting purposes.
Employee Unit Code	System-derived code indicating the collective bargaining unit associated with the employee's job title.
Employee Represen-tation Code	System-derived code indicating, for collective bargaining purposes, whether the employee is covered, not covered, or a supervisor.
Employee Special Handling Code	Code indicating the title special handling code of the predominate appointment of an individual for collective bargaining purposes.
Employee Distribution Unit Code	Code indicating the predominate distribution of the predominate appointment of an individual for collective bargaining purposes.
Job Group ID	System-derived code used for reporting.
Alternate Department Code	Code indicating an alternate department that may update the employee's personnel record. Used to give departments with joint appointments access to the employee's records. Press F1 Help to see valid codes.

Academic Prog. Unit Code	For future use.

2. Press **Enter** to invoke range/value edits.

3. Press **F11 Next Func** to continue to the next function.

7.14 ACADEMIC REHIRE (AREH)

Overview

The procedures described in this section are for rehiring an employee for an academic position. If the employee has purged from the database, use the AHIR bundle instead.

When not to use the AREH bundle:

- Intercampus transfers are entered by the Payroll office. Forward all documents to Payroll.

- If you are hiring a student (i.e., reader or graduate student researcher) who has a work study award and wishes to use their award for this position. Send the student to the Career Center to pick up a referral form and the Career Center will process the rehire action.

- If you re-hiring a student in an academic title, use the AURH bundle. Note: There is a separate DCD used for Student Academic Rehire

- If you are re-hiring a student in an academic title that holds another appointment, use the ADDL bundle.

- If you are recalling a faculty member who has an emeritus designation use the Academic Recall (ARCL) Bundle.

Policy Summary

A rehire in an academic title is the result of the academic review process established for the title. The policies for rehiring in an academic title are the same as the policies for hiring in an academic title. (See Section on Academic Hires.)

Before you Start

1. Obtain required approval (in the form of an Offer Letter) to perform the payroll/personnel action. Refer to the Campus Academic Policies & Procedures Manual (CAPPM) Appendix 1, *Delegation of Authority Chart*.

2. Work with the employee to complete the following forms:

   - Employment Eligibility Verification form (I-9), with attachments. New I-9 is not required if the employee completed this form for UCSC employment within the last 3 years. Verify previous I-9 date in the EDB.

   - The Oath/Patent is valid for 1 year from the date signed. If the signature date on the original Oath is over 1 year old, a new Oath must be signed. The Oath/Patent must be signed and witnessed on or before the first date of service*. No alterations may be made to this form.

     *First date of service may be different than hire date (e.g., 7/1-6/30 pay dates, 9/20-6/19 service dates.)

   - UC Federal and State Withholding Allowance Certificate (UC W-4/DE 4).

   - Benefits Eligibility Level Indicator (BELI) form (UPAY 726)

   - Affirmative Action Data Transmittal form (UPAY 726); applicable only if there has been a change to any of the fields.

   - Earnings Disposition (Surepay) form, if applicable

Completing the EPER Function

THE EPER (PERSONNEL-MISCELLANEOUS) FUNCTION

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│ ▭            TN3270 - uccmvsb to host uccmvsb.ucop.edu   ▼ ▲ │
├─────────────────────────────────────────────────────────────┤
│ Session  Edit  Commands  Settings  Help                     │
│ PPEPER0■E0943        SCT EDB Entry/Update      AREH 10/14/95 16:22:58 │
│ 10/09/95 21:24:16       Personnel-Miscellaneous     Userid: SCACPLJW │
│ ID: 650000903 Name: REHIRE, LECTURER DEMO    SSN: 650-00-0903 Pri Pay: MO │
│                                                             │
│ Assigned BELI: 1 Derived BELI : X       Effective Date: 070197 │
│ BELI Status Qualifiers: Primary: __ Date: _____ Secondary: __ Date: _____ │
│ Date of Hire             : 070195   Original Hire Date: _____ │
│ Employee Relations Code  : E      Employee Relations Unit: IX │
│ Probationary Period End Date  : _____                      │
│ Next Salary Review Date       : ____   Next Salary Review Type: _ │
│ Merit Rate Increase Percent   :                             │
│ Home Department               : 000900 TRAINING ON-LINE UPDATE │
│ Primary Title Code            : ____                        │
│ Employee Unit Code            : __     Employee Representation Code   : C │
│ Employee Special Handling Code: _      Employee Distribution Unit Code: _ │
│ Job Group ID                  : ___                         │
│ Alternate Department Code     : _____                      │
│ Academic Programmatic Unit Cd : _____                      │
│                                                             │
│ Next Func: ____ ID: _____ Name: _____ SSN: _____ │
│                                                             │
│ ===>                                                        │
│  F: 1-Help    2-Cancel              4-Print    5-Update     │
│  F:                      9-Jump     10-PrevFunc 11-NextFunc │
│                                             IBM-3278-2-E 16:16:54 │
└─────────────────────────────────────────────────────────────┘
```

The EPER Procedure

1. Enter data in the following fields, as applicable:

Assigned BELI	Benefits Eligibility Level Indicator (BELI). Code indicating employee's health benefits eligibility. Press Fl Help for valid codes.
Derived BELI	System-derived BELI code based on data entered previously. Normally the same as the assigned BELI code.
Effective Date	Date the employee becomes eligible for any health benefits indicated by the BELI code.
BELI Status Qualifiers	Primary: Code indicating the primary condition that qualifies the employee for health benefits when the assigned BELI and the derived BELI do not match. Press F1 Help to see valid codes. Date: Date on which the qualifying condition began, in the format: MMDDYY. Secondary: If applicable. Code indicating an additional condition that qualifies the employee for health benefits when the assigned BELI and the derived BELI do not match. Press Fl Help to see valid codes. Date: Date on which the additional qualifying condition began, in the format: MMDDYY.
Date of Hire	Date on which the *most recent* employment affiliation commenced. *See Notes and Tips.*
Original Hire Date	Leave Blank
Employee	Code indicating the employee

Completing the EPER Function

THE EPER (PERSONNEL-MISCELLANEOUS) FUNCTION

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┌─────────────────────────────────────────────────────────┐
│ ─      TN3270 - uccmvsb to host uccmvsb.ucop.edu    ▼ ▲ │
│ Session  Edit  Commands  Settings  Help                 │
│ PPEPER0-E0943          SCT EDB Entry/Update    EMTS 10/15/95 17:19:29│
│ 10/15/95 13:27:10      Personnel-Miscellaneous     Userid: SCACPLJW│
│ ID: 650000500 Name: EMERITUS, PROFESSOR DEMO  SSN: 650-00-0500 Pri Pay: MO│
│                                                         │
│ Assigned BELI: 5 Derived BELI : 1     Effective Date: 070199│
│ BELI Status Qualifiers: Primary: __ Date: _____  Secondary: __ Date: _____│
│ Date of Hire          : 070195   Original Hire Date: _____│
│ Employee Relations_Code    : E    Employee Relations Unit: 99│
│ Probationary Period End Date : _____│
│ Next Salary Review Date___  : ____  Next Salary Review Type: _│
│ Merit Rate Increase Percent : ____│
│ Home Department       : 000900 TRAINING ON-LINE UPDATE│
│ Primary Title Code    : 1100   PROFESSOR - 9-MONTHS│
│ Employee Unit Code    : AZ     Employee Representation Code  : C│
│ Employee Special Handling Code: _    Employee Distribution Unit Code: _│
│ Job Group ID          : CC│
│ Alternate Department Code  : _____│
│ Academic Programmatic Unit Cd : _____│
│                                                         │
│ Next Func: ____ ID: _____ Name: _____ SSN: _____│
│                                                         │
│ ===> _____          │
│  F: 1-Help    2-Cancel          4-Print    5-Update    │
│  F:                    9-Jump   10-PrevFunc 11-NextFunc │
│                                     IBM-3278-2-E 17:13:48│
└─────────────────────────────────────────────────────────┘
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The EPER Procedure

1. Enter data in the following fields, as applicable:

Assigned BELI	Enter **5** for WOS appointment.
	Benefits Eligibility Level Indicator (BELI) code indicating the employee's eligibility for health benefits.
Derived BELI	System-derived BELI code based on data entered previously. Normally the same as the assigned BELI code.
Effective Date	Date the assigned BELI takes effect.
Date of Hire	Date on which the Emeritus appointment commences. *See Notes and Tips.*
Original Hire Date	Leave blank.

2. Press **Enter** to invoke range/value edits.

3. This is the last function in the bundle. Proceed to *Review*.

7.16 ACADEMIC RECALL

Overview

The procedures described in this section are for processing a recall appointment for an Academic Senate member who retired from the University of California, Santa Cruz.

Policy Summary

Academic Senate members who have retired from the University of California may be recalled to active service on a year-to-year basis, or for periods less than one year.

Any recall appointment for an academic Senate member whose record is still in the EDB is considered "additional employment."

Any recall appointment for academic employees who are *not* members of the Academic Senate, should be processed using the appropriate Rehire (AREH) or New Hire (AHIR) bundle.

Refer to Campus Academic Personnel Policies and Procedures (CAPPM) Section 500 200, for general policy and procedure information or to the appropriate VERIP I/II/III reappointment guidelines for VERIP retirees.

Before You Start

1. Obtain required approval to perform the payroll/personnel action -- a letter from the dean, Executive Vice Chancellor, or Chancellor approving the appointment.

2. Have the employee complete the required forms:

   - Federal and State Withholding Allowance (W-4)

   - Benefits Eligibility Level Indicator (BELI) form (UPAY 726).

   - Opt Out or Loss of Other Group coverage form (UPAY 727), if applicable.

3. Advise the employee to contact the campus Benefits Office within 31 days, to consult regarding the affect of recall on annuitant health benefits.

4. If employee records were still in the EDB, advise them to cancel miscellaneous payroll deductions (Tax-deferred 403(b), California Casualty, Credit Union, etc.)

5. Prepare information for data entry.

Data Entry

Enter data for the recall appointment via the ARCL (Academic Recall) bundle. This bundle contains the following functions:

EAPP (Appointments/Distributions)

EPER (Personnel-Miscellaneous)

XTAX (Tax Information)

Completing the EPER Function

THE EPER (PERSONNEL-MISCELLANEOUS) FUNCTION

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TN3270 - uccmvsb to host uccmvsb.ucop.edu
Session  Edit  Commands  Settings  Help
PPEPER0 E0943            SCT EDB Entry/Update      ARCL 10/17/95 14:52:26
10/15/95 17:26:43         Personnel-Miscellaneous         Userid: SCACPLJW
ID: 650000500 Name: EMERITUS, PROFESSOR DEMO   SSN: 650-00-0500 Pri Pay: MO

Assigned BELI: 5 Derived BELI : 2      Effective Date: 070199
BELI Status Qualifiers: Primary: __ Date: _____ Secondary: __ Date: _____
Date of Hire            : 070195  Original Hire Date: _____
Employee Relations Code : E       Employee Relations Unit: 99
Probationary Period End Date : _____
Next Salary Review Date    : ____   Next Salary Review Type: _
Merit Rate Increase Percent : ____
Home Department            : 000900 TRAINING ON-LINE UPDATE
Primary Title Code        : 1100  PROFESSOR - 9-MONTHS
Employee Unit Code        : AZ    Employee Representation Code  : C
Employee Special Handling Code: _   Employee Distribution Unit Code: _
Job Group ID              : CC
Alternate Department Code : _____
Academic Programmatic Unit Cd : _____

Next Func: ____ ID: _____ Name: _____ SSN: _____
U0001  Input accepted
===>
 F: 1-Help    2-Cancel          4-Print    5-Update
 F:                    9-Jump   10-PrevFunc 11-NextFunc
                                        IBM-3278-2-E 14:47:23
```

EPER Procedure

Enter data in the following fields, as applicable:

Assigned BELI	Benefits Eligibility Level Indicator (BELI) code indicating the employee's eligibility for health benefits. Press F1 Help to see valid codes.
Derived BELI	System-derived BELI code based on data entered previously. Normally the same as the assigned BELI code.
Effective Date	Date the assigned BELI takes effect.

BELI Status Qualifiers	Primary: Code indicating the primary condition that qualifies the employee for health benefits when the assigned BELI and the derived BELI do not match. Press Fl Help to see valid codes. Date: Date on which the qualifying condition began, in the format: MMDDYY. Secondary: If applicable. Code indicating an additional condition that qualifies the employee for health benefits when the assigned BELI and the derived BELI do not match. Press Fl Help to see valid codes. Date: Date on which the additional qualifying condition began, in the format: MMDDYY.
Date of Hire	Date on which the *most recent* Recall appointment takes effect.
Original Hire Date	Leave blank
Employee Relations Code	Code indicating the employee designation/status for the purpose of collective bargaining. Press F1 Help to see valid codes, or refer to *Appendix E. Employee Relations Codes* for assistance in determining the appropriate code.
Employee Relations Unit	Code indicating collective bargaining unit of an individual. Press F1 Help to see valid codes.